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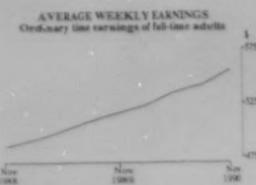
Statistics Weekly

Thursday, 18 April 1991

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Earnings rise



Final estimates for November 1990 show an increase in average weekly ordinary time earnings of 2.7 per cent for full-time adults to \$555.60, up from \$541.00 in August 1990.

The increase in ordinary time earnings for full-time adult males was 2.6 per cent (to \$589.20) while full-time adult females had a slightly higher increase of 2.7 per cent (to \$488.90).

AVERAGE WEEKLY EARNINGS, NOVEMBER 1990
Full-time adult ordinary time earnings

	Weekly earnings (\$)			Percentage change in Persons from	
	Males	Females	Persons	August 1990	November 1990
New South Wales	603.50	496.90	567.90	2.7	6.8
Victoria	591.80	492.40	587.20	2.4	7.1
Queensland	557.50	460.60	526.30	3.5	9.9
South Australia	560.80	484.20	537.30	3.0	8.3
Western Australia	596.00	481.10	555.90	2.4	7.9
Tasmania	558.00	464.70	531.60	1.0	6.6
Northern Territory	599.10	516.20	568.40	3.1	9.8
Australian Capital Territory	677.60	549.90	627.70	2.9	8.7
Australia	589.20	488.90	555.60	2.7	7.5

Average weekly total earnings for full-time adults increased by 2.6 per cent to \$590.60, an annual increase of 6.6 per cent compared with November 1989.

For further information, order the publication *Average Weekly Earnings, States and Australia (6302.0)*, or contact Mick Atkinson on (06) 252 5946.

Labour market weakens further

The March 1991 labour force survey confirmed a further weakening of the labour market. There were significant falls in employment, and labour force participation, and a sharp rise in unemployment, compared with the February seasonally adjusted estimates.

Full-time and part-time employment for both males and females fell in March. The resulting fall in total employment was the largest recorded by the monthly labour force survey since it began in February 1978. The large rise in unemployment was mainly due to an increase in the number of males looking for full-time work.

The March 1991 seasonally adjusted estimate of employed persons fell by 82,400 to 7,710,100. For males, full-time employment fell by 36,400 and part-time employment fell by 11,600. Female full-time employment fell by 21,200 and female part-time employment fell by 13,100.

The seasonally adjusted estimate of unemployed persons rose by 38,800 to 777,100 in March 1991. An increase of 32,900 in the number of males seeking full-time work was the main component.

Continued ...





The unemployment rate (seasonally adjusted) for March 1991 was 9.2 per cent, a rise of 0.5 percentage points (June 1984 was the last time that the rate exceeded 9.0%). For males, the unemployment rate increased by 0.7 percentage points to 9.4 per cent and for females the rate rose by 0.2 percentage points to 8.8 per cent.

In March 1991, the seasonally adjusted labour force participation rate fell by 0.4 percentage points to 63.2 per cent. The male participation rate fell by 0.3 percentage points to 74.9 per cent and the female participation rate fell by 0.5 percentage points to 51.7 per cent.

LABOUR FORCE SURVEY ESTIMATES Seasonally adjusted

	Employed			Unemployed	Unemploy- ment rate — per cent —	Partic- ipation rate — per cent —
	Full-time workers	Part-time workers	Total			
	— '000 —					
1990 —						
December	6,169.2	1,676.8	7,846.0	690.3	8.1	63.8
1991 —						
January	6,157.4	1,665.8	7,823.2	712.1	8.3	63.7
February	6,065.2	1,727.4	7,792.5	738.3	8.7	63.6
March	6,007.5	1,702.6	7,710.1	777.1	9.2	63.2

For further information, order the publication *The Labour Force, Australia, Preliminary* (6202.0), or contact Heather Crawford (06) 252 6525.

Re-financing boosts January business finance

Business finance commitments (i.e. commercial finance and lease finance commitments) in January 1991 were at the highest level, \$9,248.8 million, since May 1990.

Total commitments increased by \$306 million (3.4%) in January 1991 compared with December 1990, but the net increase was heavily influenced by two special factors.

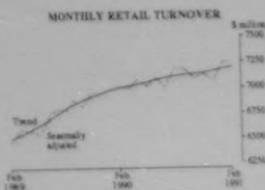
Firstly, it was largely attributable to an abnormally high level of 'refinancing' which increased by \$1,696.1 million, just under 200 per cent. In Victoria, loan refinancing of \$2,345.3 million accounted for just over 85 per cent of fixed loan financing in that State.

The outcome was also affected by the fact that January 1991 was a five week reporting period for some banks, whereas December 1990 was a four week period.

In contrast to the overall increase, lease finance commitments (excluding leveraged leases), totalled \$262.3 million in January 1991, the lowest monthly level since the series commenced in January 1985.



Retail trend remains weak



Trend estimates of retail turnover continue to indicate weak growth. The average increase at current prices for the three months ended February is 0.2 per cent per month, the same as the average monthly increase over the last year. The annual increase (February 1991 over February 1990) is now 2.8 per cent.

Grocers, confectioners and tobacconists, and clothing and fabric stores are showing moderate to strong growth over the past three months. The three monthly average increase for the clothing industry is significantly higher than the twelve month average.

Department stores have shown virtually no growth over the last three months. Hotels, liquor stores and licensed clubs are still in decline.

RETAIL TURNOVER

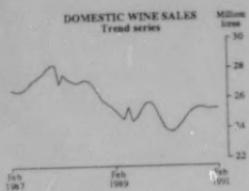
	Percentage change in trend estimates		
	Original value in February 1991 \$ million	Average monthly increase for 3 months to February 1991	February 1991 over February 1990
Grocers, confectioners, tobacconists	1,985	0.9	10.4
Hotels, liquor stores, licensed clubs	862	-0.7	0.7
Department and general stores	507	0.0	3.1
Clothing and fabrics stores	416	1.2	5.5
Other industries	2,495	n.a.	n.a.
All industries	6,365	0.2	2.8

Examination of 'food' and 'non food retail' industry groups reveals that the food group has averaged 0.7 per cent growth over the three months to February compared with 0.3 per cent over the same period for the non food group. Annual growth rates (February 1991 over February 1990) show 7.2 per cent and 1.3 per cent respectively. However, the non food group appears to be recovering from a period of decline evident from about August 1990.

With the exception of Western Australia all States are now showing increases in the trend estimates of turnover. Tasmania and the Australian Capital Territory are showing moderate growth. The growth rate in South Australia has slowed following a short period of strong growth. Western Australia continues the slight decline evident over the last few months.

For further information, order the publication Retail Trade, Australia (8501.0), or contact Bill Powell on (06) 252 6132.

Wine improves with time



After a lengthy decline, from a peak of 28.3 million litres in December 1987 to a low of 23.8 million litres in March 1990, the trend estimate for domestic sales of Australian wines by winemakers has improved and since August 1990 appears to have stabilised at around 25.3 million litres per month.

As usual, original and seasonally adjusted wine sales have exhibited considerable variability over the past eight months. In particular, strong sales in November and December 1990 have been offset by low sales in January 1991. This effect is similar to, but not as marked as, that seen in the same period of the previous year.

Over the eight months since July 1990, table wine has experienced moderate growth of 2 per cent compared with the same months of the previous year. Red table wine has the strongest growth (10%) with a rise of 20.5 per cent in sales of red wine in casks being the most significant contributor. White wine sales increased marginally by 0.5 per cent while rosé wine sales fell by 6.7 per cent.

In the same time, bulk fermented sparkling wine sales have declined by more than one third, causing an overall decline in the sales of sparkling wine of 5.3 per cent. Fortified wines sales also decreased (8%).

DOMESTIC SALES OF AUSTRALIAN WINE BY WINEMAKERS
'000 litres

Month	Wine type				Total wine sales	Total wine sales trend estimate
	Table	Fortified	Sparkling	Other		
1990 -						
July	20,778	3,951	1,899	879	27,507	25,091
August	20,237	2,917	1,605	572	25,343	25,271
September	19,866	2,380	2,424	657	25,327	25,394
October	18,992	2,458	3,116	630	25,196	25,398
November	24,261	2,883	4,296	1,030	32,470	25,320
December	25,474	2,579	6,047	901	35,001	25,274
1991 -						
January	12,341	1,330	1,902	402	15,975	25,322
February	17,779	1,691	2,050	598	22,118	25,324

Wine exports for the first seven months of the financial year (which are not included in domestic sales figures) are showing exceptional growth. Figures for this period are 57 per cent higher than for the same period last year, and have already reached 79 per cent of the previous record year (1988-89).

Over the three years 1987-88 to 1989-90, the ratio of exports of wine to domestic sales has averaged from 12 to 13 per cent. So far this financial year the ratio is 17 per cent.

For further information, order the publication Sales of Australian Wine and Brandy by Winemakers (8504.0), or contact Robert Johns on (08) 237 7621.

Inquiries

The ABS supplies a wide range of statistical information:

- through its bookshops
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Suggestions

Any suggestions for improvement to this publication should be addressed to:

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All the week's releases: 10 to 16 April

General

Information Paper: ASCO — Australian Standard Classification of Occupations, 1990 (Information Paper revised April 1991) (1221.0; free)
Statistics Weekly, 11 April 1991 (1318.0; \$4.00)
 Time Series Service — Manual, December Qtr 1990 (Available on magnetic tape and microfiche only) (1336.0; free)

Demography

Overseas Arrivals and Departures, Aust., November 1990 (3401.0; \$6.00)
 Estimated Resident Population in Statistical Local Areas, WA, June 1990, Preliminary (3204.5; \$10.00)

National accounts, finance and foreign trade

Personal Finance, Aust., January 1991 (5642.0; \$5.50)
 Commercial Finance, Aust., January 1991 (5643.0; \$5.50)

Labour statistics and prices

The Labour Force, Aust., March 1991, Preliminary (6202.0; \$10.00)
 The Labour Force, Aust. — Preliminary Data on Floppy Disk, March 1991 (6271.0; \$65.00)
Average Weekly Earnings, States and Aust., November 1990 (6302.0; \$10.00)
 Award Rates of Pay Indexes, Aust., February 1991 (6312.0; \$10.00)

Agriculture

Livestock Products, Aust., February 1991 (7215.0; \$7.00)
 Fruit, Qld, 1989–90 (7322.3; \$12.00)
 Agricultural Land Use and Selected Inputs, SA, 1989–90 (7411.4; \$15.00)

Secondary industry and distribution

Manufacturing Production, Aust., Household Appliances and Electrical Equipment, January 1991 (8357.0; \$6.50)
 Manufacturing Production, Aust., Food, Drink, Tobacco, Stock and Poultry Food, January 1991 (8359.0; \$10.00)
 Manufacturing Production, Aust., Building Materials and Fittings, January 1991 (8361.0; \$6.50)
 Manufacturing Production, Aust., Plastics, Rubber, Paints, Detergents and Industrial Chemicals, January 1991 (8362.0; \$6.50)
 Manufacturing Production, Aust., Metal Products, January 1991 (8367.0; \$5.50)
 Retail Trade, Aust., February 1991 (8501.0; \$10.00)
 Building Activity, Aust., December Qtr 1990 (8752.0; \$13.50)
 Engineering Construction Survey, Aust., December Qtr 1990 (8762.0; \$10.00)
 Production Statistics, NSW, January 1991 (8304.1; \$7.50)
 Dwelling Unit Commencements Reported by Approving Authorities, NSW, January 1991 (8741.1; \$10.00)
 Building Activity, NSW, December Qtr 1990 (8752.1; \$10.00)
 Dwelling Unit Commencements Reported by Approving Authorities, Qld, January 1991 (8741.3; \$10.00)
 Building Activity, Qld, December Qtr 1990 (8752.3; \$10.00)
 Dwelling Unit Commencements Reported by Approving Authorities, SA, December Qtr 1990 (8741.4; \$10.00)
 Dwelling Unit Commencements Reported by Approving Authorities, Tas., January 1991 (8741.6; \$3.50)

Calendar of key releases

Expected releases over the fortnight to 30 April 1991

- [22] Housing Finance for Owner Occupation, Australia, February 1991 (5609.0; \$10.00)
Export Price Index, Australia, February 1991 (6405.0; \$7.50)
- [23] Price Index of Materials Used in Building Other Than House Building, Eight Capital Cities, February 1991 (6407.0; \$10.00)
- [24] Price Index of Materials Used in House Building, Six State Capital Cities and Canberra, February 1991 (6408.0; \$7.50)
- [26] Price Indexes of Articles Produced by Manufacturing Industry, Australia, February 1991 (6412.0; \$10.00)
Manufacturing Production Australia, February 1991, Preliminary, (8301.0; \$10.00)
Registrations of New Motor Vehicles, Australia, March 1991, Preliminary, (9301.0; \$10.00)
- [30] Price Indexes of Materials Used in Manufacturing Industries, Australia, February 1991 (6411.0; \$10.00)

The latest ...

Changes to key State indicators — consolidated to
16 April 1991



Statistics Weekly
18 April 1991

	NSW	Vic.	Qld	SA	WA	Tas.	NT	ACT	Aust.
— Percentage change from same period previous year —									
New capital expenditure (Sept. qtr 90)*	-0.9	-10.9	5.4	11.2	-17.9	37.2	n.a.	n.a.	-3.4
Retail turnover (Feb. 91) (trend estimate)	3.4	-2.4	4.6	8.8	2.2	6.3	n.a.	9.5	2.8
New motor vehicle registrations (Feb. 91)†	-14.4	-25.6	-15.2	-20.6	-18.9	-24.3	-34.8	11.4	-18.3
Number of dwelling unit approvals (Feb. 91)	-7.8	21.1	1.8	-7.4	-17.7	-9.0	-30.5	-54.1	-11.1
Value of total building work done (Dec. qtr 90)	2.5	-11.1	-23.0	9.6	-25.5	-24.7	11.4	5.3	-8.5
Employed persons (March 91)*	-0.4	-4.0	-1.5	-0.1	-1.8	-0.3	-0.5	5.3	-1.6
Capital city consumer price index (Dec. qtr 90)	6.4	7.4	6.2	7.8	7.4	6.1	7.1	6.8	6.9
Average weekly earnings (full-time adult ordinary time) (November 90)	6.8	7.1	9.9	8.3	7.9	6.6	9.8	8.7	7.5
Population (Sept. 90)	1.1	1.4	2.4	1.1	2.3	1.1	0.9	2.5	1.5
Room nights in licensed hotels and motels etc (Sept. qtr 90)	3.2	0.1	6.5	1.8	0.8	23.5	7.4	20.9	4.2

* Seasonally adjusted except for NT and ACT. † Seasonally adjusted except for Tas., NT and ACT.

The latest ...

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Key national indicators - consolidated to 16 April 1991

	Period	Latest figure available		Percentage change (a) on	
		Original	Seasonally adjusted	Previous period	Corresponding period last year
National production					
Gross domestic product — current prices	\$m	Dec. qtr 90	101,082	95,247	1.3
— 1984-85 prices	"	"	70,031	64,725	0.6
Industrial activity					
New capital expenditure — current prices	\$m	Dec. qtr 90	7,305	6,612	3.2
— 1984-85 prices	"	"	5,542	5,027	3.6
Expected new capital expenditure	"	Three months to Dec. 90	8,311	n.a.	-5.7
Retail turnover — current prices	"	February 91	6,365	7,250	3.5
— 1984-85 prices	"	Dec. qtr 90	16,480	14,620	-1.6
New motor vehicle registrations	no.	February 91	39,405	43,550	-0.9
Dwelling unit approvals	"	February 91	9,860	10,474	-2.9
Value of all building approvals	\$m	"	1,915	2,212	-3.4
Value of total building work done	"	Dec. qtr 90	7,391	7,069	-4.5
— current prices	"	"	4,634	4,452	-1.0
— 1984-85 prices	"	Dec. qtr 90	36,754	35,064	-1.0
Manufacturers' sales — current prices	"	"	25,318	24,154	-5.0
Manufacturers' sales — 1984-85 prices	"	"	"	"	"
Expected manufacturers' sales	"	Six months to June 91	70,139	n.a.	-1.8
Labour					
Employed persons	'000	March 91	7,746.5	7,710.1	-1.1
Unemployment rate †	%	"	9.6	9.2	0.5
Participation rate †	%	"	63.8	63.2	-0.4
Job vacancies	'000	November 90	34.1	35.4	-27.8
Average weekly overtime per employee	hours	"	1.3	1.3	-1.9
Prices, profits and wages					
Consumer price index	1980-81 = 100.0	Dec. qtr 90	214.5	n.a.	2.7
Price index of materials used in manufacturing industries	1984-85 = 100.0	January 91	125.6	n.a.	-2.5
Price index of articles produced by manufacturing industry	1988-89 = 100.0	January 91	111.9	n.a.	-0.8
Company profits before income tax	\$m	Dec. qtr 90	4,640	3,911	15.9
Average weekly earnings (full-time adults; ordinary time)	\$	November 90	555.60	n.a.	2.7
Interest rates (b) (monthly average)					
90-day bank bills †	% per annum	February 91	11.65	n.a.	-0.20
10-year Treasury bonds †	"	"	11.55	n.a.	-0.05
Balance of payments					
Exports of merchandise	\$m	February 91	4,271	4,452	4.8
Imports of merchandise	"	"	3,981	4,274	1.6
Balance of merchandise trade (c)	"	"	290	178	97.8
Balance of goods and services (c)	"	"	218	-73	62.0
Balance on current account (c)	"	"	-1,230	-1,434	12.8
Terms of trade (d)	1984-85 = 100.0	Dec. qtr 90	n.a.	97.9	-5.8
Foreign investment					
Net foreign debt	\$m	30 Dec. 90	130,771	n.a.	1.9
Net foreign liabilities	"	"	172,363	n.a.	0.4
Exchange rates (monthly average)					
SUS	per SA	February 91	0.7843	n.a.	0.7
Trade weighted index	May 1970 = 100.0	"	57.3	n.a.	-0.5
Other indicators					
Population (resident at end of qtr)	million	Sept. 90	17.1	n.a.	0.4
Overseas visitor arrivals	'000	October 90	191	188	-1.4

(a) Based on seasonally adjusted figures where available. (b) Source Reserve Bank of Australia. (c) For percentage changes, a minus sign indicates an increase in the deficit; no sign means a decrease in the deficit or an increase in the surplus. (d) The ratio of the price of goods and services for exports to that for imports.

NOTES: † = change is shown in terms of percentage point. n.a. = not available.
 Figures have been taken from a variety of ABS publications. Copies may be obtained from Information Services (see page 6).
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